TORONTO

This bulletin examines data from the City's annual Employment Survey for the City's Employment Districts. For further information on the Employment Survey visit:

toronto.ca/demographics/surveys.htm

profile TORONTO

July 2010

Employment Districts Profile

1. Overview

The Employment Areas land use designation is a key implementation tool for achieving the growth management strategy of the City of Toronto Official Plan. Recognizing the need to preserve stable employment lands for job security and growth, and enhance the competitive position of these lands in the broader regional context, the trends and changes of these areas need to be understood.

The Official Plan defines Employment Districts as large districts comprised of lands where the Employment Areas land use designation applies. Some of these districts are characterized by manufacturing and warehousing uses, while some are exclusively commercial office parks, yet all are to be protected from the encroachment of non-economic functions. The objectives of the Official Plan are to enhance these lands for diverse economic purposes in order to not only ensure a stable environment for investment and maintain and grow the City's tax base, but also offer suitable locations for a variety of employment uses and nurture accessible local and region-wide employment clusters.

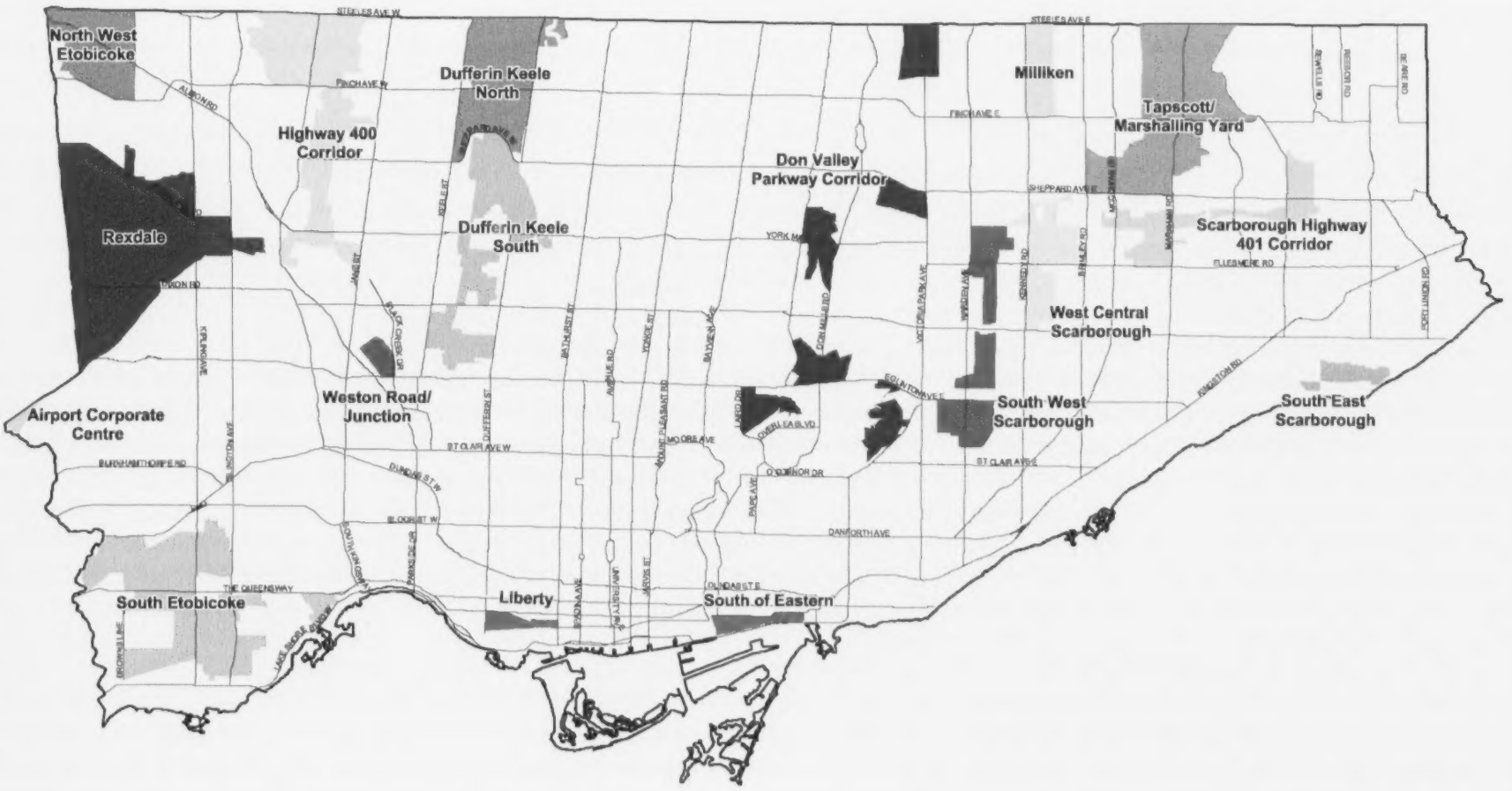
Over the past few years, development in the Employment Districts has been changing, in particular the scale of activity in different sectors and the relationship within those sectors. Employment in the City is expected to grow to at least 1.64 million by the year 2031. The need to monitor the Employment Districts and ensure they remain attractive places for business investment in order for them to be attractive enough to accommodate the incremental growth anticipated by this forecast is key.

The City's 17 Employment Districts (see Map 1) are currently home to more than 364,000 jobs, or approximately 28% of all the jobs found in the Toronto. They are the location for over 18,000 firms, or about 25% of all the firms in Toronto.

The Employment Districts are not static. Since 2002 there has been a resurgence of business activity, and this is where new establishments are choosing to locate. While the number of establishments across the City of Toronto has remained relatively stable, within the Employment Districts the number of establishments has grown by nearly 10%. Employment growth has not been occurring within these Districts as there has been a 6% decrease in jobs between 2002 and 2009. Meanwhile, the rest of the City saw a 2.4% increase in employment within the same time period. Therefore, on average the rising numbers of establishments within the Districts are employing fewer people than they did in the past.

Looking at employment sector trends can present a more comprehensive picture of the transformations that are occurring across the Districts. Since 2002, the Manufacturing sector has seen a loss of more then 40,000 jobs and 200 establishments in the Employment Districts (although it remains a relatively strong sector). Yet, the Office sector has been the economic engine both within the City as a whole and the Employment Districts since 2002, as it has remained the strongest sector containing the highest number of both establishments and jobs. This sector had 6,336 firms (increase of 6% from 2002) with 154,774 jobs (increase of 4.3% from 2002) in 2009. In the Retail and Service sectors, there are 6,000 more jobs and nearly 900 more establishments in 2009 than there were in 2002.

Map 1: Employment Districts, City of Toronto



TORONTO

** Functionally, the Airport Corporate Centre is part of a much larger business park in Mississauga*

Toronto City Planning, Research and Information June 2010

Ranging in size from 28 hectares to 1,764 hectares, the Employment Districts are spread out across the City. Generally irregular in size, with a few Districts geographically broken into sub sections (i.e. Don Valley Parkway Corridor includes six separate sections), not all Districts are the same. Along with physical variations, the large differences in the establishment and employment ranges must be taken into consideration; the Don Valley Parkway Corridor District is home to more than 72,000 employees and 2,415 establishments, while the Airport Corporate Centre District is home to just over 1,000 employees and 41 establishments in 2009 (Table 1 and Table 2).

2. Methodology and Data Sources

This report examines and provides a detailed numerical base of establishment and employment trends for the 17 Employment Districts in the City. It also updates the March 2002 report *Historic Profile of Employment Districts*, and builds on the information provided in the *Profile Toronto, Toronto Employment Survey 2009* report.

The analysis focuses on changes occurring at three points in time: 2002, 2006 and 2009. These years were chosen as they represent when the Official Plan was approved by Toronto City Council (2002), the year the Official Plan came into effect through approval by the Ontario Municipal Board (2006), and the most current data year (2009). By looking at these snapshot time periods, the geography of economic development, sector trends, and changing opportunities can be recognized.

Data for this report comes from the Toronto Employment Survey (TES) database. Since 1983, this unique survey has been conducted to monitor economic activity, provide information for policy and decision-making, and offer additional context for the planning of municipal infrastructure and services.

Table 1: Total Establishments and Percent Change

	Absolute Establishment			Percent Change		
	2002	2006	2009	2002-2006	2006-2009	2002-2009
North West Etobicoke	651	718	772	10.29%	7.52%	18.59%
Rexdale	1,350	1,411	1,436	4.52%	1.77%	6.37%
South Etobicoke	1,503	1,579	1,603	5.06%	1.52%	6.65%
Highway 400 Corridor	1,892	2,118	2,126	11.95%	0.38%	12.37%
Weston Road/Junction	67	64	67	-4.48%	4.69%	0%
Liberty	455	411	500	-9.67%	21.65%	9.89%
South of Eastern	125	116	125	-7.2%	7.76%	0%
Dufferin Keele North	2,279	2,302	2,309	1.01%	0.30%	1.32%
Dufferin Keele South	998	1,194	1,184	19.64%	-0.84%	18.64%
Don Valley Parkway Corridor	2,299	2,431	2,415	5.74%	-0.66%	5.05%
Milliken	822	886	1,082	7.79%	22.12%	31.63%
Tapscott Marshalling Yard	1,743	2,067	2,020	18.59%	-2.27%	15.89%
Scarborough Hwy 401 Corridor	809	895	932	10.63%	4.13%	15.20%
West Central Scarborough	938	977	932	4.16%	-4.61%	-0.64%
South West Scarborough	695	638	724	-8.20%	13.48%	4.17%
South East Scarborough	69	76	57	10.14%	-25.00%	-17.39%
Airport Corporate Centre	17	33	41	94.12%	24.24%	141.18%
Employment District Total	**16,712**	**17,916**	**18,325**	**7.20%**	**2.3%**	**9.7%**
Rest of the City	55,538	55,019	55,313	-0.9%	0.5%	-0.4%
City Total	72,250	72,935	73,638	0.9%	1.0%	1.9%

For the purpose of this report, overall employment and establishment counts from the TES are examined. Additionally, the TES 6-sector breakdown, based on the primary type of employment activity taking place is used to analyze industry growth and breakdown. The six sectors are: Manufacturing/ Warehousing, Retail, Service, Office, Institutional and Other. Businesses by Employment Range, New Establishments in 2009 (these can either be establishments that are newly created or firms that are new to the particular district), and Longevity of Establishments, are three other variables that are explored.

The sectors analyzed are generalized categories that include a valuable profile of the City's establishments. The following are examples (not inclusive) of the type of establishments found within each sector. The Manufacturing sector includes processing and assembling plants (including food, heavy machinery or clothing), printing reproduction, transportation/logistics, scrap yards, warehousing and treatment plants. The Retail sector includes pharmacies, lumber yards, large scale stores, stores selling vehicle parts and variety stores. The Service sector includes bus terminals, dry cleaners, restaurants, fast food, beauty salons, equipment maintenance, car rentals and hotels. The Office sector includes travel agencies, banks, government offices, film studios and the head offices of retail chains. The Institutional sector includes schools (public and private), hospitals, places of worship, police stations and court of laws. Finally, the Other sector includes on-site construction (i.e. residential or office), botanical gardens, fitness clubs, stadiums, and golf courses.

Table 2: Total Employment and Percent Change

	Absolute Employment									Change	Change	Change
	2002			2006			2009			2002 - 2006	2006 - 2009	2002- 2009
	Full	Part	Total	Full	Part	Total	Full	Part	Total	Total	Total	Total
North West Etobicoke	11,111	1,807	12,918	11,749	2,069	13,818	11,386	1,773	13,159	7.0%	-4.8%	1.9%
Rexdale	41,009	8,469	49,478	41,084	7,129	48,213	37,105	7,588	44,693	-2.6%	-7.3%	-9.7%
South Etobicoke	36,570	4,736	41,306	37,582	4,410	41,992	38,078	4,845	42,923	1.7%	2.2%	3.9%
Highway 400 Corridor	34,156	3,362	37,518	31,946	3,528	35,474	29,264	3,111	32,375	-5.4%	-8.7%	-13.7%
Weston Road/Junction	2,589	145	2,734	928	46	974	1,693	29	1,722	-64.4%	76.8%	-37.0%
Liberty	5,372	557	5,929	5,846	704	6,550	6,865	844	7,709	10.5%	17.7%	30.0%
South of Eastern	6,316	1,125	7,441	6,067	1,028	7,095	4,120	963	5,083	-4.7%	-28.4%	-31.7%
Dufferin Keele North	27,535	4,570	32,105	25,749	5,158	30,907	25,073	4,422	29,495	-3.7%	-4.6%	-8.1%
Dufferin Keele South	23,491	2,512	26,003	24,222	2,625	26,847	21,713	2,607	24,320	3.2%	-9.4%	-6.5%
Don Valley Parkway Corridor	67,499	9,212	76,711	65,521	11,616	77,137	62,283	10,359	72,642	0.6%	-5.8%	-5.3%
Milliken	5,796	1,429	7,225	5,355	1,917	7,272	5,316	1,828	7,144	0.7%	-1.8%	-1.1%
Tapscott Marshalling Yard	28,814	2,923	31,737	29,782	3,218	33,000	26,465	3,822	30,287	4.0%	-8.2%	-4.6%
Scarborough Hwy 401 Corridor	14,860	2,397	17,257	15,835	2,256	18,091	15,285	2,380	17,665	4.8%	-2.4%	2.4%
West Central Scarborough	14,952	2,531	17,483	14,816	2,639	17,455	12,697	2,420	15,117	-0.2%	-13.4%	-13.5%
South West Scarborough	16,592	2,982	19,574	15,029	3,302	18,331	14,909	2,921	17,830	-6.4%	-2.7%	-8.9%
South East Scarborough	1,027	63	1,090	1,076	103	1,179	864	87	951	8.2%	-19.3%	-12.8%
Airport Corporate Centre	523	111	634	628	193	821	839	218	1,057	29.5%	28.7%	66.7%
Employment District Total	**338,212**	**48,931**	**387,143**	**333,215**	**51,941**	**385,156**	**313,955**	**50,217**	**364,172**	**-0.5%**	**-5.4%**	**-5.9%**
Rest of the City	658,494	217,671	876,165	669,303	225,153	894,456	694,424	234,597	929,021	2.1%	3.9%	6.0%
City Total	996,706	266,002	1,263,308	1,002,518	277,094	1,279,612	1,008,379	284,814	1,293,193	1.3%	1.1%	2.4%

Table 3: Establishments and Employment Counts by Sector for 17 Employment Districts

	Mfg/Ware						Retail						Service						Office					
	2002		2006		2009		2002		2006		2009		2002		2006		2009		2002		2006		2009	
	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp
North West Etobicoke	186	7,824	193	8,189	215	7,585	114	1,028	126	985	129	897	139	1,276	161	1,295	164	1,268	177	2,532	199	3,064	211	2,981
Rexdale	300	17,032	298	15,364	314	12,879	174	2,882	210	3,620	179	2,856	343	7,539	353	6,793	344	7,142	475	17,752	473	16,999	501	16,468
South Etobicoke	400	19,984	390	16,401	400	16,435	217	4,591	268	5,210	235	4,523	367	5,030	399	5,332	409	5,382	468	10,371	468	13,970	473	14,993
Highway 400 Corridor	663	22,204	636	18,404	641	15,712	252	2,889	335	3,541	305	3,138	517	4,852	580	4,928	563	4,458	383	6,762	464	7,676	471	8,210
Weston Road/Junction	28	1,256	27	390	27	303	9	70	9	87	6	65	3	30	3	27	4	776	23	791	18	182	22	268
Liberty	30	1,391	19	1043	16	1,066	19	155	36	524	36	340	32	162	30	151	45	780	365	3,928	310	4,347	387	5,373
South of Eastern	17	2,901	16	2,542	13	2,411	10	362	13	459	13	531	26	424	28	433	28	327	67	3,684	53	3,601	61	1,740
Dufferin Keele North	459	11,416	417	9,361	401	7,957	535	4,741	503	5,457	466	4,720	416	2,936	452	2,857	453	2,669	789	11,486	828	11,443	842	12,139
Dufferin Keele South	215	8,363	214	7,477	195	5,456	300	3,217	448	4,328	429	4,570	158	2,625	173	2,918	177	2,802	272	10,098	299	10,275	296	9,580
Don Valley Parkway Corridor	253	15,619	244	12,974	218	9,547	227	3,080	248	3,792	251	4,053	232	3,192	243	3,280	253	3,010	1,488	52,006	1,543	53,769	1,501	52,712
Milliken	145	1,816	148	1,682	120	1,145	173	778	201	1,003	291	1,163	156	987	182	1,045	227	1,244	300	3,289	308	2,904	354	2,891
Tapscott Marshalling Yard	606	16,853	603	16,589	603	13,196	297	3,187	476	4,276	400	4,136	281	2,414	359	2,847	383	2,945	494	8,695	528	8,302	498	8,805
Scarborough Hwy 401 Corridor	207	4,889	193	4,361	197	3,422	112	1,675	159	2,146	152	1,792	115	1,440	112	1,502	117	2,345	327	8,341	375	9,018	388	8,823
West Central Scarborough	282	9,360	287	9,210	259	6,868	208	2,486	210	2,179	193	1,979	219	1,856	242	1,871	233	2,078	203	3,462	198	3,624	185	3,625
South West Scarborough	212	8,798	192	7,321	187	5,540	115	2,517	102	1,813	133	2,299	214	2,016	209	2,078	232	2,092	126	5,103	103	5,653	119	5,636
South East Scarborough	42	922	49	924	30	666	4	12	5	11	5	15	10	42	6	52	4	18	10	89	11	130	12	207
Airport Corporate Centre	2	464	5	451	5	473	1	2	1	2	2	5	9	102	14	191	14	177	4	39	9	106	15	323
Employment District Total	**4,047**	**151,092**	**3,931**	**132,683**	**3,841**	**110,661**	**2,767**	**33,672**	**3,350**	**39,433**	**3,225**	**37,082**	**3,237**	**36,903**	**3,546**	**37,600**	**3,650**	**39,513**	**5,971**	**148,428**	**6,187**	**155,063**	**6,336**	**154,774**
Rest of the City	1,442	28,782	1,339	22,333	1,272	19,468	14,413	110,239	13,738	110,348	13,011	105,195	13,401	105,575	13,566	107,859	13,564	111,449	21,436	433,172	21,083	430,823	21,707	456,094
City Total	5,489	179,874	5,270	155,016	5,113	130,129	17,180	143,911	17,088	149,781	16,236	142,277	16,638	142,478	17,112	145,459	17,214	150,962	27,408	581,600	27,270	585,886	28,043	610,868

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Table 3: Establishments and Employment Counts by Sector for 17 Employment Districts (continued from previous page)

	Institutional						Other						Total					
	2002		2006		2009		2002		2006		2009		2002		2006		2009	
	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp
North West Etobicoke	21	109	25	127	33	237	14	149	14	158	20	191	651	12,918	718	13,818	772	13,159
Rexdale	39	1,287	49	1,288	54	1,138	19	2,986	28	4,149	44	4,210	1,350	49,478	1,411	48,213	1,436	44,693
South Etobicoke	37	974	36	517	36	626	14	356	18	562	50	964	1,503	41,306	1,579	41,992	1,603	42,923
Highway 400 Corridor	59	469	84	578	101	555	18	342	19	347	45	302	1,892	37,518	2,118	35,474	2,126	32,375
Weston Road/Junction	4	587	7	288	8	310	0	0	0	0	0	0	67	2,734	64	974	67	1,722
Liberty	6	239	10	426	8	57	3	54	6	59	8	93	455	5,929	411	6,550	500	7,709
South of Eastern	3	46	5	45	5	53	2	24	1	15	5	21	125	7,441	116	7,095	125	5,083
Dufferin Keele North	67	1,188	75	1,272	79	1,378	13	338	27	517	68	630	2,279	32,105	2,302	30,907	2,309	29,495
Dufferin Keele South	33	1,286	41	1,477	60	1,522	20	414	19	372	27	390	998	26,003	1,194	26,847	1,184	24,320
Don Valley Parkway Corridor	79	2,322	122	2,757	138	2,778	20	492	31	565	54	542	2,299	76,711	2,431	77,137	2,415	72,642
Milliken	43	352	45	632	58	624	5	23	2	6	32	77	822	7,225	886	7,272	1,082	7,144
Tapscott Marshalling Yard	51	396	75	575	85	775	14	192	28	411	51	430	1,743	31,737	2,067	33,000	2,020	30,287
Scarborough Hwy 401 Corridor	41	769	48	960	60	1,179	7	143	8	104	18	104	809	17,257	895	18,091	932	17,665
West Central Scarborough	20	142	33	449	43	451	6	177	7	122	19	116	938	17,483	977	17,455	932	15,117
South West Scarborough	16	772	21	1,191	31	1,156	12	368	11	275	22	1,107	695	19,574	638	18,331	724	17,830
South East Scarborough	2	24	2	28	3	24	1	1	3	34	3	21	69	1,090	76	1,179	57	951
Airport Corporate Centre	0	0	2	28	3	34	1	27	2	43	2	45	17	634	33	821	41	1,057
Employment District Total	**521**	**10,962**	**680**	**12,638**	**805**	**12,897**	**169**	**6,086**	**222**	**7,739**	**468**	**9,245**	**16,712**	**387,143**	**17,916**	**385,156**	**18,325**	**364,172**
Rest of the City	3,961	172,368	4,240	192,871	4,451	203,600	885	26,029	1,053	30,222	1,308	33,215	55,538	876,165	55,019	894,456	55,313	929,021
City Total	4,482	183,330	4,920	205,509	5,256	216,497	1,054	32,115	1,275	37,961	1,776	42,460	72,250	1,263,308	72,935	1,279,612	73,638	1,293,193

3. Findings

The following provides a detailed explanation of the trends in the data for the 17 Employment Districts.

- **The Number Of Firms In The Employment Districts Is Increasing**

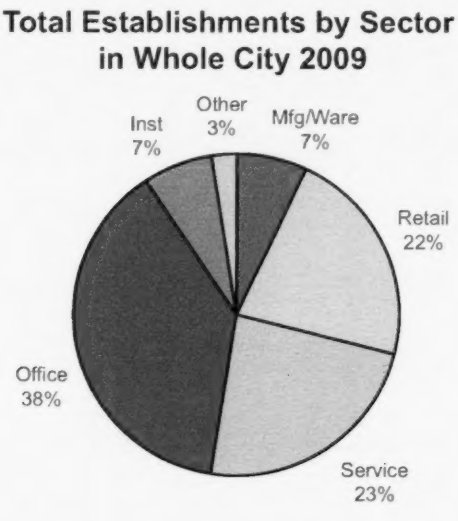
Establishment growth has only occurred in the Employment Districts, not in the rest of the City (Table 1). Growth was recorded in 13 of the 17 Employment Districts with a total of 1,600 more firms in 2009 than there were in 2002 (two of the remaining four Districts experienced no change). Most of this growth occurred between 2002 and 2006 (7.2%), while after 2006, the growth was slightly slower at 2.3%. This signifies that Employment Districts do retain business and attract new business formation. In the rest of the City there was a 0.4% decrease in the number of establishments between 2002 and 2009.

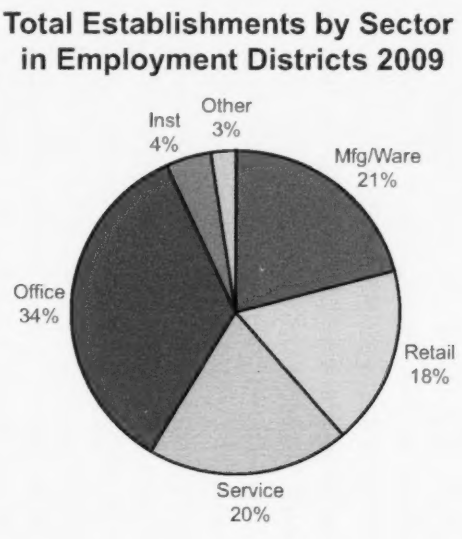
- **Total Jobs Have Declined In The Employment Districts But Increased In The Rest Of The City**

City-wide employment has gradually increased by a little over 1% for each time period, with an increase of 16,304 jobs between 2002 and 2006, and 13,581 jobs between 2006 and 2009 (see Table 2). The increase in employment is largely a result of the increase in part-time jobs. Full-time employment makes up approximately 78% of the total employment for 2002, 2006 and 2009. Part-time employment increased 4.2% (11,092) from 2002 to 2006, and 2.8% (7,720) between 2006 and 2009.

Within the Employment Districts total employment has decreased by 5.9% (22,971 jobs) since 2002. Between 2002 and 2006 employment decreased 0.5% (-1,987), and between 2006 and 2009 it fell a further 5.4% (–20,984). The higher loss in employment in the Districts was due to a more pronounced decline in Canadian manufacturing. Full-time employment makes up the largest share of the employment in the Districts with 87% for 2002 and 86% for 2006 and 2009. The decrease in total employment comes primarily from the decrease in full-time employment, with a decline of 1.5% (-4,997) from 2002 to 2006, and a drop of 5.8% (-19,260) from 2006 to 2009. Part-time employment did increase from 2002 to 2009 by 2.6% (1,286).

Chart 1: Proportion of Sector Establishment by Sector for Whole City and Employment Districts (2009)





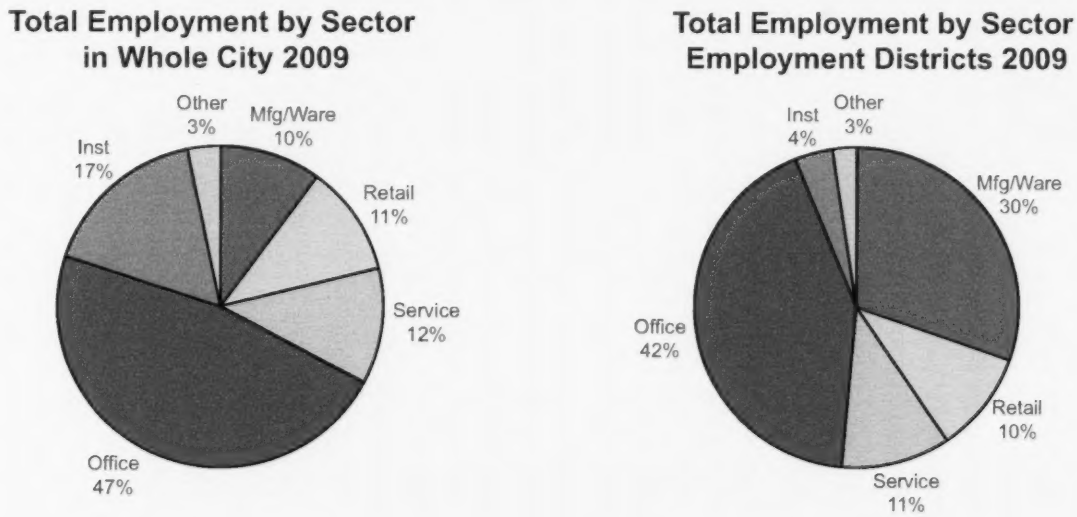
- **The Office Sector Has The Most Establishments In The Employment Districts**

Across the City of Toronto, the Office sector has continuously maintained its lead from 2002 through to 2009, with approximately 38% of the City's total establishments (Chart 1). Within the Employment Districts, the Office sector also leads with over 6,300 firms in 2009. Manufacturing was consistently second in the Employment Districts from 2002 to 2009, as its total share decreased from 24.2% in 2002 to 21% in 2009. This was due to a loss of 206 establishments from 2002 to 2009 (Table 3). By 2009, both the Service and Retail sectors had increased their proportion of establishments (Service 19.9%, Retail 17.6%), bringing them close to Manufacturing. Total establishments within Retail increased 21.1% (583) from 2002 to 2006, but decreased 3.7% (-125) from 2006 to 2009. Within Service there was an increase of 9.5% (309) from 2002 to 2006, with a further increase of 2.9% (104) by 2009.

- **Employment In The Districts Shows The Continued Importance Of Manufacturing**

Like the trend in establishments, the Office sector is the largest employment sector within the City, with 46% (581,600 jobs) in 2002 and 47% (610,868 jobs) in 2009 (see Chart 2). Within the Employment Districts, the Office and Manufacturing sectors account for almost three-quarters of all jobs. However, it should be noted that the Office sector has increased from 38.3% to 42.5% of total employment from 2002 to 2009 (6,346 additional jobs), while Manufacturing has decreased from 39% to 30.4%. The change in Manufacturing was due to a decrease of 40,431 jobs from 2002 to 2009 (12.2% decrease between 2002 and 2006, with another decline of 16.6% from 2006 to 2009). Yet in 2009 there were still a total of 110,661 jobs in Manufacturing. Within the Retail sector, employment increased 17.1% from 2002 to 2006, and then decreased 6% from 2006 to 2009. It is important to note that within the Retail sector the proportion of employment made up of part-time jobs is slowly increasing from 23% in 2002 to nearly 29% in 2009.

Chart 2: Proportion of Employment by Sector for Whole City and Employment Districts (2009)



- **Individual Employment Districts Have Varied Patterns Of Growth**

As the overall number and types of firms found in the Employment Districts change over the years, the changes yield varied patterns of growth between the Districts (Chart 3 and 4). Since 2002, both the Highway 400 Corridor District and the Dufferin Keele South District have had high establishment growth rates, yet they have suffered significant decreases in employment. Only four districts, North West Etobicoke, South Etobicoke, Liberty and Scarborough Highway 401 Corridor experienced both an increase in establishments and employment. Liberty and South of Eastern, as the only downtown districts, have opposing trends; Liberty's employment has increased by 30% and establishments by 10%, while South of Eastern employment has decreased by 32% yet establishments have not changed.

In Chart 3, Liberty, South Etobicoke and Airport Corporate Centre are the only Districts that had continuous employment growth from 2002 to 2009. The growth in Liberty was primarily in the Office, Retail and Service sectors. This may be accounted for by the permissions in the Garrison Common North Secondary Plan for retail development (including a grocery store), cultural and artistic services, and media and communication operations. In South Etobicoke, again growth was in the Retail and Service sectors, which could be accounted for by site specific policies which allow for commercial facilities of the types serving day-to-day needs of local residents. In Airport Corporate Centre, although relatively small, growth was noted in every sector.

Only four districts recorded establishment losses from 2002 to 2006, while five recorded losses from 2006 to 2009 (Chart 4). West Central Scarborough and South East Scarborough are the only two Districts to have experienced an overall loss since 2002. In West Central Scarborough the overall loss (-0.4%) of establishments was felt within the Manufacturing (-8%) and Office sectors (-9%). In South East Scarborough, the loss of 17.4% of the establishments was primarily felt within Manufacturing (-28%).

Chart 3: Change in Total Employment Numbers

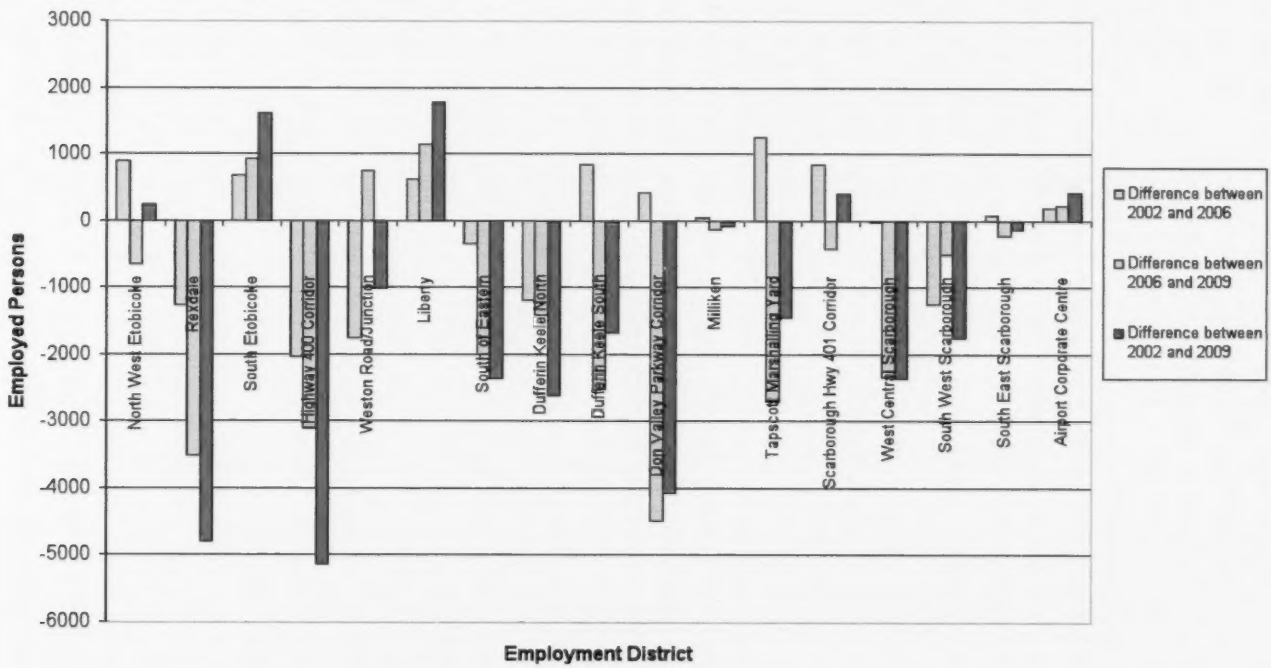
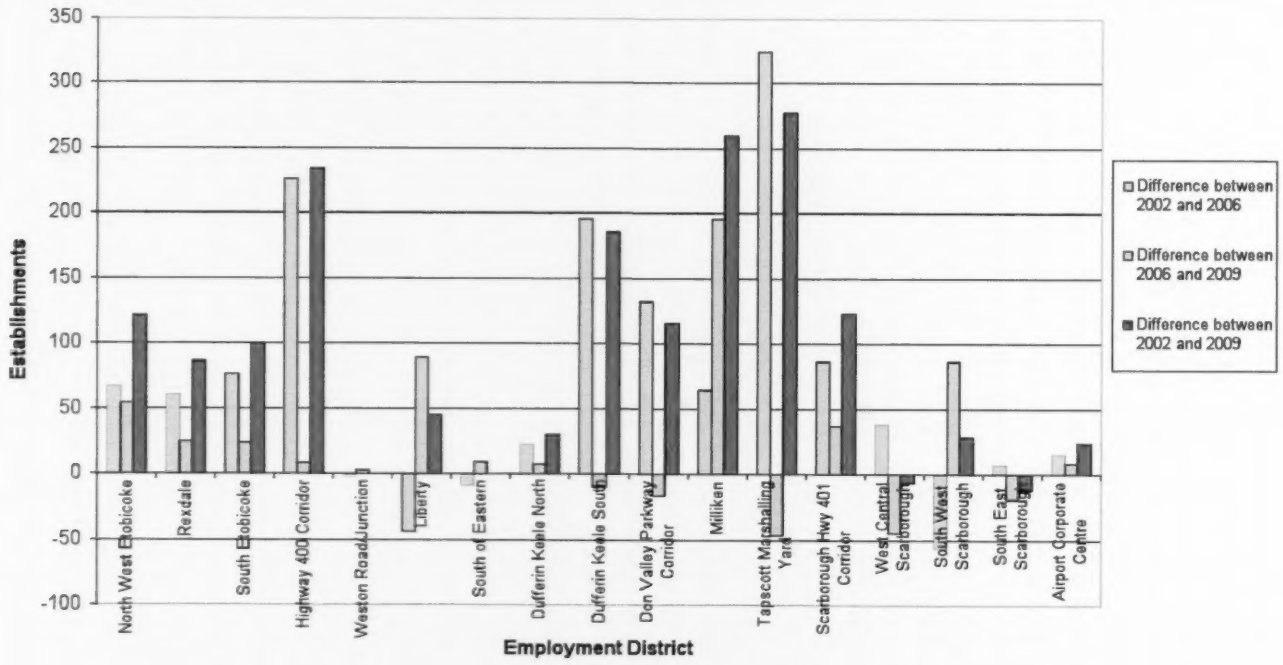


Chart 4: Change in Total Establishment Numbers



Different sectors dominate the Districts leading to significant variations in the distribution and number of jobs and establishments. Rexdale, South Etobicoke, Highway 400 Corridor and Tapscott/Marshalling Yard have significant Manufacturing bases, while Don Valley Parkway is nearly two thirds Office establishments and employment. Rexdale did experience Retail growth from 2002 to 2006 (21% establishments; 26% employment), but by 2009 the numbers had decreased to nearly the 2002 levels. Although Dufferin Keele North does have a large Retail base, this sector experienced a slight decline in employment and establishment count. On the other hand, Dufferin Keele South, the district that borders it immediately to the south, experienced a sizeable increase in the same sector. In Milliken, the Office sector (the dominant sector) establishment count rose by 18%, but its employment count dropped by 12%. In South Etobicoke, Office sector employment jumped between 2002 and 2006, and grew slightly more towards 2009 (total of 45% increase). Yet, the Office establishment count remained stagnant with only a 1% increase. Virtually every District grew notably in terms of the number of Institutional and Office establishments, however, the employment trend in these sectors varied between Districts. In Scarborough Hwy 401 employment increased 53% in the Institutional sector, while in Weston Road/ Junction it decreased 47%. South West Scarborough employment increased 200% in the Other sector, yet in West Central Scarborough it decreased by 35%.

- **Over 960 Firms Were New To The Employment Districts Last Year**

In 2009, there were 3,824 new establishments in the City, with approximately 25% (960) of these found in the Employment Districts (see Table 4). Significant new employment was generated by these new establishments, as 23,000 new jobs were added to the City, of which 6,000 were located in the Employment Districts. Of the new establishments in the Districts only 13 contained more then 100 jobs; there were 5 Manufacturing firms, 3 Institutional firms, 2 Office firms, 1 Service firm, and 2 large scale Retail firms with more than 100 jobs. Most of the new establishments are fairly small, employing only a handful of people (774 contained four or fewer jobs).

Table 4: New Establishments in 2009

	Mfg/Ware		Office		Inst		Service		Retail		Other		Total	
	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp	Est	Emp
Employment Districts	129	1,316	293	1,902	50	786	184	860	172	1,048	134	119	962	6,031
Rest of the City	41	288	1,100	9,531	173	1,550	746	3,129	598	2,332	204	231	2,862	17,061
Total	170	1,604	1,393	11,433	223	2,336	930	3,989	770	3,380	338	350	3,824	23,092

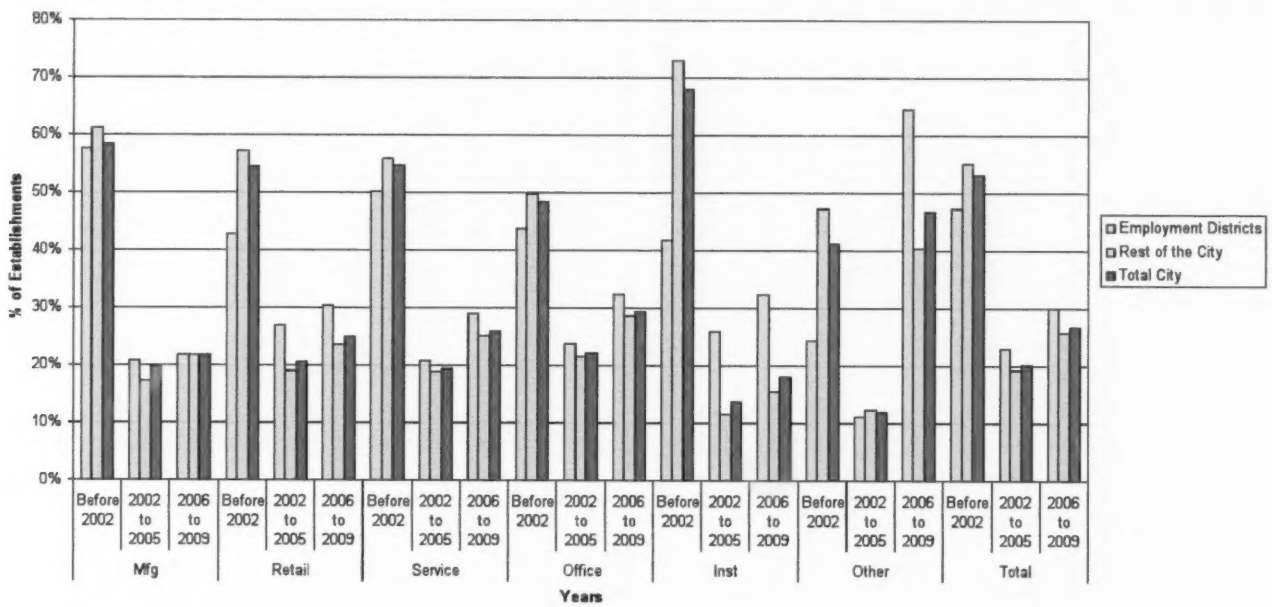
* *The Other sector new establishments are primarily construction based establishments.*

The new growth emphasizes the importance of the Employment Districts as locations for incubation of new business. Reinforcing this is the observation that 129 Manufacturing firms were new to the Employment Districts in 2009, employing over 1,300 people, illustrating that there is growth within this sector. Within the Retail and Other sector, small scale establishments made up close to 100% of the new establishments; the other sectors were comprised of 70-80% small-scale firms.

- **Over Half Of The Firms In The Employment Districts Were Established After 2002**

While 47% of the establishments in the Districts were established prior to 2002, 23% were established between 2002 and 2006, and a further 30% were established after 2006 (Chart 5). These proportions are similar to findings for the City overall, where 53% were established before 2002, 20% between 2002 and 2006, and 27% after 2006. The most notable sector in the Districts is the Other sector as it is the only one to have experienced more establishment start-ups since 2006 than any other time period. Manufacturing, on the other hand, tends to have more longevity in the Districts with close to 60% having established prior to 2002; approximately 20% were established in each of the other two time periods.

Chart 5: Longevity of Existing Establishments



4. Conclusion

Employment Districts are the hothouses where Toronto grows its businesses and jobs. With close to one third of the jobs in the City, these areas provide a broad range of opportunities for Toronto residents and the regional labour force. Since 2002, these areas have grown in importance by retaining significant employment and encouraging incubation of new businesses. While it is important to understand the evolution of the Employment Districts as a whole and as they relate to the rest of the City, it is vital to recognize the uniqueness of the individual Districts. Some areas are more suited to specific types of business activity, but it is important to preserve and enhance all sectors. Through its planning and economic development toolbox, Toronto will have to accommodate significant growth in employment by 2031 in order to meet the growth target of 1.64 million. Achieving significant new investment and employment intensification in the Employment Districts will be fundamental to this growth.

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